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IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

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Applicant	:	Eng-Keong Lee	Docket No.	:	IT-03-006
Filed	:	October 29, 2003			
Art Unit	:	2151			
Examiner	:	John B. Walsh			

Title : ENDPOINT STATUS NOTIFICATION SYSTEM

APPLICANT'S DECLARATION UNDER 37 C.F.R. §1.131

Mail Stop *RCE*
Commissioner For Patents
P.O. Box 1450
Alexandria, VA 22313-1450

Dear Sir:

I, Eng-Keong Lee, declare as follows:

1. This declaration is to establish priority of invention in this application in the United States, at a date prior to April 2, 2003, which is the effective filing date of U.S. Patent Publication No. 2004/0196963 A1 to Appelman et al., the primary reference cited in the Office Action of October 18, 2006.

2. I am the sole inventor of the subject matter described and claimed in United States Patent Application Serial No. 10/696,148, filed October 2, 2003, entitled ENDPOINT STATUS NOTIFICATION SYSTEM, which subject matter is disclosed and claimed in the above-referenced patent application.

3. To establish priority of invention, the following documents are attached as evidence of fact:

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Exhibit A: "Talon – Functional Specification, Revision 1" (dated August 26, 2002);

Exhibit B: "Talon – Product Definition Notebook, Revision 4 and 5" (Rev. 4 dated October 1, 2002 and Rev. 5 dated October 25, 2002); and

Exhibit C: "Unified Communicator™ Installation and Configuration Manual" (dated August 2003).

4. The documents included as Exhibits resulted from my research, programming, and engineering to create an alert system to notify the user when a reportable event has occurred. It can be seen that the invention in this application was made at least by the date of the first attached document, August 26, 2002, which is a date earlier than the effective filing date of the cited Appelman reference.

5. Exhibit A is an excerpt of an internal project management document dated August 26, 2002 that outlines the functional specifications of a soon-to-be released product code-named "Talon." The Talon functionality was eventually incorporated into Inter-Tel's then-existing Unified Communicator® system at the release of Unified Communicator version 2.0 in mid 2003. The excerpt is pages 1-10 and 41-43 of the entire Functional Specification. Pages 2-6 are the Table of Contents and show that at section 2.4.3.3.2, "Alerts" begin on page 41. Pages 8-10 are the Introduction, of which pages 9-10 introduce the "Tray Client Enhancements" of which embody my invention. Beginning on page 41 at "Alerts", it can be seen that the notification system as described and claimed in the subject patent application is substantially detailed.

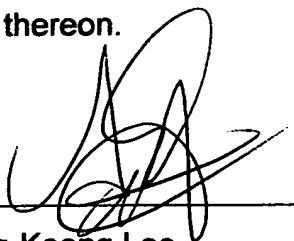
6. Exhibit B is an excerpt of another internal project management document that further defines the functional specifications of the Talon project. The document has two displayed dates, October 1, 2002 (Rev 4) and October 25, 2002 (Rev 5). The excerpt is pages 1-13 and 57-58 of the entire Product Definition Notebook and is essentially the same as Exhibit A.

7. Exhibit C is an excerpt of the Unified Communicator Installation and Configuration Manual, Issue 2.0 dated August 2003. The Manual accompanied the sale of the Unified Communicator product. The excerpt is the front cover, table of contents and introduction. Page xi introduces some of the new features and enhancements to the Unified Communicator product, including the tray client enhancements of my invention. Chapter 5 "End-User Features begins on page 153 of the Manual (but is re-numbered as Page 5-1) and includes the notification system of the present application. The re-numbered pages of relevance are 5-1 through 5-20, 5-76, 5-81 through 5-82, and 5-86 through 5-87. Pages 5-19, 5-86 and 5-87 describe and depict the pop-up alerts as disclosed in the patent application. Pages 5-81 and 5-82 describe and depict the Alerts tab as disclosed in the patent application. Pages 5-76, 5-13 and 5.14 describe and depict the speed dial panel as disclosed in the patent application. The remaining pages further describe the endpoint status notification system as disclosed in the patent application.

5. Pursuant to MPEP 715.09(D) this Declaration is timely filed after the prosecution is closed but concurrent with a request for continued examination (RCE) under 37 CFR 1.114.

6. I hereby declare that all statements made herein are of my own knowledge, are true, and that all statements made on information and belief are believed to be true; and further that these statements were made with the knowledge that willful false statements and the like so made are punishable by fine or imprisonment, or both, under Section 1001 of Title 18 of the United States Code, and that such willful false statements may jeopardize the validity of the above-referenced application or any patent issuing thereon.

Dated: 2/8/2007



Eng-Keong Lee

EXHIBIT A

Talon

Functional Specification

Revision 1

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Document History

Revision	Date	Author	Description
1	8/6/02	Scott Dillman	Created Initial Document

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1. Introduction

1.1 Product Overview

The purpose of this document is to define the functional specifications for the Talon project. Talon is the project name of the next major release of Unified Communicator. The first two releases of Unified Communicator were named Raven (1.0) and Raptor (1.1).

The following is a high-level bullet list of the features in Talon:

- Accounts Supporting Multiple Devices
- Composite Status - A composite status refers to a state that the user is in at a given time. This state encompasses the user's availability, current location, the DND on his device(s), and his Windows Messenger status. When the user changes his composite status, all of these components are changed accordingly. Likewise, when a user changes the DND on one of his devices, the new DND is matched to one of his composite status items, and his composite status is changed automatically. Composite status allows a user to more easily manage all of his individual status/location elements.
- Groups – User-definable groups of contacts (ex. "Friends"). They can be used in the 'Who' portion of call routing, are used on the web client as a speed-dial list, and are used by the WAP client to browse the address book.
- System Messages – Persistent message store where the user can be informed of system events.
- Call Log
- Statistics – On usage and significant events
- Call Routing
    - Positive Caller ID – A series of steps taken to positively identify an incoming caller so the call follows the appropriate set of routing rules. This may include one or more of the following: address-book lookup, account lookup, device lookup, prompt for name, prompt for number
    - Custom Greetings – User-created recordings that can be played to callers during call routing.
    - List of user-programmable rules define how incoming calls are routed. Each rule has the following characteristics:
        - Who – Defines who the rule applies to (All callers, Specific contact, Specific phone number, Group, Internal/External Caller)
        - When – Defines when the rule applies (When I'm available, When I'm unavailable, Regardless of my availability status, When my current location is..., Regardless of my current location, During this time period)
        - What – Defines what the rule does. Consists of one or more steps where each step includes the following:
            - What to do: Play this greeting, Send the call to my current location, Send the call to this location, Send the call to a contact, system account, or device, Send the call to specified phone number (internal extension or CO number), Send the call to my voice mail, Hang up
            - Let me screen the call after I answer
            - After x seconds, proceed to the next step if not successful
- Administrator Web Client Enhancements
    - Account management (add, edit, delete, change/reset password, enable/disable)
    - Batch account edit
    - Node programming

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- Multiple programming views: accounts/external directories, logged-in accounts, devices/nodes (Each of which can be viewed by ID or user-friendly name)
- Enable/disable device – Determines whether it can be used by a UC account

- Standard Web Client Enhancements
  - New high-level toolbar that includes the following features:
    - Incoming call indication with basic call control
    - Ability to view/change composite status.
    - Speed-dial button that maps to a user-defined group – Shows current status of each contact and allows place call, send station message, call voicemail for each contact
    - Feature-code favorites button
    - User-defined "Person" buttons - User can add buttons that represent people. Button shows real-time status of person. Clicking on button allows call to person.
    - Type-ahead search – Typing in box automatically brings up a list of search results from which the user can see status, place calls, send station messages, call voicemail boxes, and view/edit contacts.
    - Web client includes a "collapse" button that collapses the UI down to just the toolbar which is shown on the user's PC with an "always on top" attribute.
  - Call List Enhancements
    - Exists as a collapsible area on the main UI, not as a separate view (When the user places a call, this area automatically opens)
    - Call list shows calls even when your current location is not office
    - Call shows in call list while it is being routed. Display indicates what is happening to the call. Ability to break into routing and answer the call at your current location. Possibly the ability to pull the call back from voicemail.
    - If a UC user calls the device of a non-UC user and that device is in DND, the call list shows that the device is in DND (displaying the textual DND message).
    - At any time while a call is ringing a device, the user can do one of the following: leave a station message (terminates the call), transfer to the device's voicemail.
  - Program Microsoft .NET Passport
- Tray Client Enhancements
  - Scrolling pop-up messages (a'la Windows Messenger)
    - Indicate incoming calls including caller identification and support for basic call control
    - Indicate new message received (station or voicemail) – Click to go to web-client messages list
    - Indicate status changes of contacts in speed-dial list
  - Execute feature-code favorites
  - Enable/disable routing rules
  - Set composite status
  - Redial (from call log)
  - Enable/disable 'Handle my passport calls' option
- WAP Client Enhancements
  - Composite Status – View/set your current composite status
  - Messages Menu – Station Message Enhancements

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        - Shows snapshot of current status of person/device who left station message and allows the following options: Return call, Send station message, Leave voice mail, Delete
    - Lookup Contact (From Place Call or Address Book Menus) –Shows snapshot of current status, Supports send station message and leave voicemail
    - Place Call Menu
        - Browse by Group – Ability to browse for a contact to call using the user-defined groups
        - Specify phone number to call
        - Call Log – View recent calls and return call
        - Allows all numbers to be edited before dialing
        - Dial internal extensions using WAP device through use of a pilot number programmed by admin
    - Address Book – Lookup Contact, Browse by Group, Add Contact (specify name and number)
    - Call Routing – Enable/Disable routing rules
    - Devices – View/Set DND and Forwarding for each of your devices
    - Passport – Edit your Microsoft .NET Passport (e-mail address and password)
- Phone-Client Enhancements
    - Get/set composite status
    - Barge in on TTS
    - Log off by saying "Goodbye"
    - Ability to include accounts in place-call search
    - Enable/disable routing rules
    - Review call log (Next, Previous, Return Call, Delete)
    - Enable/disable 'Handle my passport calls' option
    - Auto logon when calling from an owned device or location
- PocketPC Client Supporting the following features:
    - Composite Status
        - View/change current
        - MAYBE: Add/Edit/Delete
    - Devices
        - Add/remove device
        - View/change DND and Forwarding
    - Address Book (View/call/email contact)
    - Call Routing (Enable/Disable Rules)
    - Messages
    - Type-ahead search
    - Call List
    - Feature Codes
- Advanced IP Phone Client (Falcon) – Supports all of the features of the standard web client plus user-interface features specific to the operation of the phone.

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This icon indicates that the tray client is currently logged in to the Unified Communicator server, and that the given user is unavailable. A tool tip from the icon will indicate the user's current composite status.

This icon indicates that the tray client is currently logged in to the Unified Communicator server, that the given user is unavailable, and that the user has one or more new station or voice-mail messages. A tool tip from the icon will indicate how many new messages the user has.

This icon indicates that the tray client is not currently logged in to the Unified Communicator server. A tool tip from the icon will indicate that the client is not connected.

This icon indicates that the tray client failed to connect to the Unified Communicator server. Check the properties to insure that the tray client is configured correctly.

2.4.3.3.2 Alerts

The tray client is capable of alerting the user when certain events occur by scrolling a small window up from the tray-client icon in the system tray. The window contains information on the event that occurred, and it remains on the screen for a short period of time before automatically disappearing. The user can control what types of alerts he receives and how long the alerts remain on the screen though fields in the properties page which is described in a section below. The tray client is capable of alerting the user of the following types of events:

2.4.3.3.2.1 New Message Received

When the user receives a new station message or voicemail message on one of the devices associated with his account, the tray client will notify him of the new message received. The notification will indicate what type of message was received, which device it was received on, and who the message is from. If the new message is a voicemail message, then the alert will also indicate which mailbox the message was left in. While the alert is on the screen, the user can click on the alert message to bring up the messages area of the standard web client.

2.4.3.3.2.2 Incoming Call

When the user receives a new incoming call on one of the devices associated with his account, the tray client will notify him of the ringing call. This notification indicates whether it is an internal or external call, and who the call is from (if available). The notification also includes an answer button that the user can click to answer the call, and a send-to-voicemail button that the user can click to send the call directly to voicemail. The user can also click on the text of the notification itself to bring up the call-list area of the standard web client.

2.4.3.3.2.3 Contact Status Changed

The user can choose to monitor the status of contacts in his speed-dial list. Every time the composite status of one of these contacts changes, the tray client will notify the user of the contact's new status. The notification indicates the name of the contact whose status changed, and the contact's new composite status (description, availability, and location). The user can click on the text of the notification to bring up the speed-dial list on the standard web client.

2.4.3.3.3 Menu

When a user wishes to use the tray client, he simply right clicks on the tray-client icon and a popup menu appears. This section describes the options available from the tray-client menu.

2.4.3.3.3.1 Exit

The user can select this menu option to exit from the tray client. If he has configured the tray client to prompt for confirmation on exit, then he will be prompted before the application closes. Refer to the 'Properties' section below for more information on this configuration option.

2.4.3.3.3.2 Properties

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The user can select the properties menu option to view and configure the properties for the tray client. The properties dialog consists of three tabs: General, Alerts, and About.

2.4.3.3.3.2.1 General

The general tab allows the user to configure the general settings of the tray client. It consists of the following configuration fields:

Web address	This field specifies the Unified Communicator web URL which is typically 'http://<MACHINE>/UC'. This field is configured automatically by the standard web client during the tray-client installation, and should not need to be changed. The tray client uses this URL to retrieve configuration information including settings that allow it to connect to the Unified Communicator server.
Username	This field stores the username of the user's account when the tray client is configured to automatically log the user in. If this field is blank, then the tray client will prompt the user for a username and password to log in.
Password	This field stores the user's password when the tray client is configured to automatically log the user in.
Log on when program launches	This checkbox allows the user to specify whether he wants the tray client to automatically log in to the Unified Communicator server every time the tray client launches. For the best ease of use, we recommend that the user fill in his username and password to enable this option. This will allow for more seamless integration between the tray client and the standard web client.
Start this program when Windows starts	This checkbox allows the user to specify whether he wants the tray client to automatically start every time Windows restarts. If this option is checked, then every time the user restarts his machine, the tray client will automatically start up.
Display confirmation dialog on exit	This checkbox allows the user to specify whether he wants the tray client to prompt for confirmation when the user chooses to exit the application.

2.4.3.3.3.2.2 Alerts

The alerts tab allows the user to choose which events he would like the tray client to notify him of. The user can enable or disable any of the following:

Display alert when new message arrives	If this option is checked, then the user will receive an alert when any of the devices owned by his account receives a new station or voicemail message.
Display alert when incoming call is ringing	If this option is checked, then the user will receive an alert when an incoming call rings in to one of his devices.
Display alert when contacts change status	If this option is checked, then the user will receive an alert when the composite status of one of the contacts in his speed-dial list changes.
Display the alert window for X seconds	This field allows the user to specify how long each alert remains on the screen before disappearing.

2.4.3.3.3.2.3 About

The about tab shows the following system information:

Product Version	This field indicates the overall Unified Communicator product version.

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Client Version	This field indicates the current version of the standard web client and tray client installed on the user's machine.
Protocol Version	This field indicates the current version of the protocol that the Unified Communicator client is using to communicate with the Unified Communicator server.

2.4.3.3.3.3 Log On/Log Off

If the tray client is not currently logged in to the Unified Communicator server, then the 'Log On' menu item allows the user to log on his tray client. If the tray client is currently logged on to the Unified Communicator server, then a 'Log Off' menu item allows the user to log off his tray client.

2.4.3.3.3.4 My Status

This menu option brings up a popup menu allowing the user to change his current composite status. The user's current setting appears in the menu with a check mark next to it. The menu contains a list of all the user's composite statuses. The user can select one of his composite statuses to set his current status to the status indicated by the menu item.
The menu also includes an 'Edit' option. The user can click on this menu item to bring up his composite-status list in the standard web client.
The menu also includes a 'Temporary' option to allow the user to set a temporary composite status. If the user places his mouse over this option, a menu opens prompting him to select whether he will be available or unavailable. Once he selects one of these options, a popup menu appears prompting him to enter the phone number of his temporary status. Once the user enters a phone number, he can press 'Enter' to change to the new status, or 'Esc' to cancel. Refer to the concepts section on composite status for more information on temporary composite status.

2.4.3.3.3.5 Device Options

Each of the user's devices will appear in the menu under the description that he gave them. For example, if the user has a single device that he chose to call 'My Phone', then there will be a 'My Phone' option in the menu. If the user hovers his mouse over one of his devices, a new menu opens up that gives him the following options: Do-Not-Disturb, Forwarding, and Feature Codes.

2.4.3.3.3.5.1 Do-Not-Disturb

This menu option brings up a popup menu allowing the user to change the DND of his device. The device's current DND setting appears in the menu with a check mark next to it. The menu contains 'OFF', and a list of all DND messages available to the device. The user can select a menu item to set the device's DND to the status indicated by the menu item. If the user sets the DND to something other than 'OFF', then he will be prompted with a popup window allowing him to enter additional text to go along with the given DND. He can press 'Esc' to cancel the DND change from this window, press 'Enter' without entering text to set the DND without additional text, or he can enter additional text and press 'Enter'.
The tray client will keep track of the user's most commonly used DND choices, and it will keep them readily accessibly at the top of the menu, with less commonly used status choices available through a separate popup menu accessed through choosing 'More' from the main DND menu.

2.4.3.3.3.5.2 Forwarding

This menu option brings up a popup menu allowing the user to set or change the manual forwarding on his device. The menu includes the following options: All, Busy, No Answer, No Answer / Busy. The user can simply select one of the menu options to indicate which calls he would like to be forwarded. He will then be prompted to enter the phone number he would like to forward to. He can press 'Esc' to cancel the forwarding change from this window, or he can enter a phone number and press 'Enter' to accept the forwarding change.
If manual forwarding is currently enabled on the device, then an icon will appear next to the 'Forwarding' menu option, a check mark will appear next to the current forwarding type (All, Busy, No Answer, or No

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EXHIBIT B

Talon

Product Definition Notebook

Revision .540

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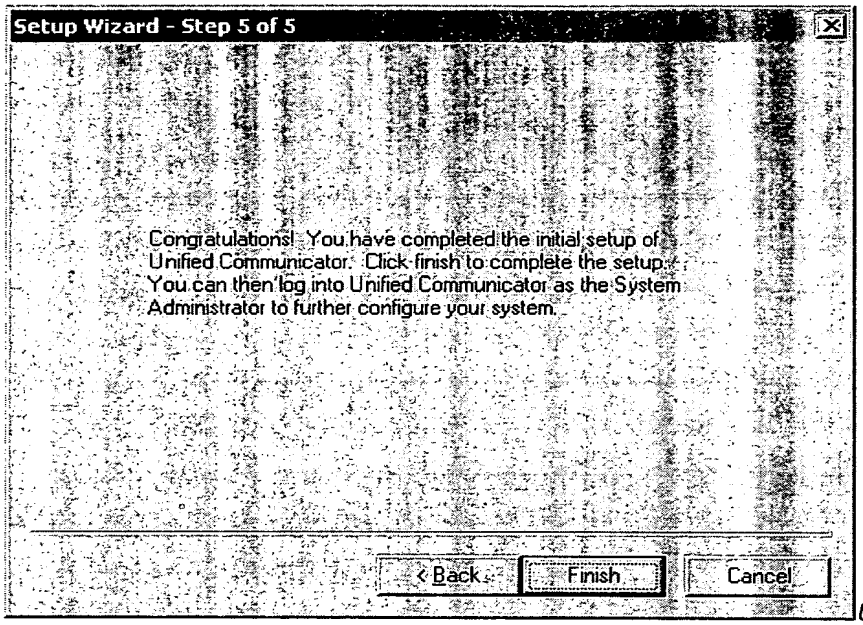

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1. Introduction

1.1 Product Overview

The purpose of this document is to define the functional specifications for the Talon project. Talon is the project name of the next major release of Unified Communicator. The first two releases of Unified Communicator were named Raven (1.0) and Raptor (1.1).

The following is a high-level bullet list of the features in Talon:

- Accounts Supporting Multiple Devices
- Composite Status - A composite status refers to a state that the user is in at a given time. This state encompasses the user's availability, current location, the DND on his device(s), and his Windows Messenger status. When the user changes his composite status, all of these components are changed accordingly. Likewise, when a user changes the DND on one of his devices, the new DND is matched to one of his composite status items, and his composite status is changed automatically. Composite status allows a user to more easily manage all of his individual status/location elements.
- Groups – User-definable groups of contacts (ex. "Friends"). They can be used in the 'Who' portion of call routing, are used on the web client as a speed-dial list, and are used by the WAP client to browse the address book.
- System Messages – Persistent message store where the user can be informed of system events.
- Call Log
- Statistics – On usage and significant events
- Call Routing
    - Positive Caller ID – A series of steps taken to positively identify an incoming caller so the call follows the appropriate set of routing rules. This may include one or more of the following: address-book lookup, account lookup, device lookup, prompt for name, prompt for number
    - Custom Greetings – User-created recordings that can be played to callers during call routing.
    - List of user-programmable rules define how incoming calls are routed. Each rule has the following characteristics:
        - Who – Defines who the rule applies to (All callers, Specific contact, Specific phone number, Group, Internal/External Caller)
        - When – Defines when the rule applies (When I'm available, When I'm unavailable, Regardless of my availability status, When my current location is..., Regardless of my current location, During this time period)
        - What – Defines what the rule does. Consists of one or more steps where each step includes the following:
            - What to do: Play this greeting, Send the call to my current location, Send the call to this location, Send the call to a contact, system account, or device, Send the call to specified phone number (internal extension or CO number), Send the call to my voice mail, Hang up
            - After x seconds, proceed to the next step if not successful
- Administrator Web Client Enhancements
    - Account management (add, edit, delete, change/reset password, enable/disable)
    - Batch account edit
    - Node programming

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- Multiple programming views: accounts/external directories, logged-in accounts, devices/nodes (Each of which can be viewed by ID or user-friendly name)
- Enable/disable device – Determines whether it can be used by a UC account

- Standard Web Client Enhancements
  - New high-level toolbar that includes the following features:
    - Incoming call indication with basic call control
    - Ability to view/change composite status.
    - Speed-dial button that maps to a user-defined group – Shows current status of each contact and allows place call, send station message, call voicemail for each contact
    - Feature-code favorites button
    - User-defined "Person" buttons - User can add buttons that represent people. Button shows real-time status of person. Clicking on button allows call to person.
    - Type-ahead search – Typing in box automatically brings up a list of search results from which the user can see status, place calls, send station messages, call voicemail boxes, and view/edit contacts.
    - Web client includes a "collapse" button that collapses the UI down to just the toolbar which is shown on the user's PC with an "always on top" attribute.
  - Call List Enhancements
    - Exists as a collapsible area on the main UI, not as a separate view (When the user places a call, this area automatically opens)
    - Call list shows calls even when your current location is not office
    - Call shows in call list while it is being routed. Display indicates what is happening to the call. Ability to break into routing and answer the call at your current location. Possibly the ability to pull the call back from voicemail.
    - If a UC user calls the device of a non-UC user and that device is in DND, the call list shows that the device is in DND (displaying the textual DND message).
    - At any time while a call is ringing a device, the user can do one of the following: leave a station message (terminates the call), transfer to the device's voicemail.
  - Program Microsoft .NET Passport (if Margarita is licensed)
- Tray Client Enhancements
  - Scrolling pop-up messages (a'la Windows Messenger)
    - Indicate incoming calls including caller identification and support for basic call control
    - Indicate new message received (station or voicemail) – Click to go to web-client messages list
    - Indicate status changes of contacts in speed-dial list
  - Execute feature-code favorites
  - Enable/disable routing rules
  - Set composite status
  - Redial (from call log)
  - Enable/disable 'Handle my passport calls' option (if Margarita is licensed)
- WAP Client Enhancements
  - Composite Status – View/set your current composite status
  - Messages Menu – Station Message Enhancements

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        - Shows snapshot of current status of person/device who left station message and allows the following options: Return call, Send station message, Leave voice mail, Delete
    - Lookup Contact (From Place Call or Address Book Menus) –Shows snapshot of current status, Supports send station message and leave voicemail
    - Place Call Menu
        - Browse by Group – Ability to browse for a contact to call using the user-defined groups
        - Specify phone number to call
        - Call Log – View recent calls and return call
        - Allows all numbers to be edited before dialing
        - Dial internal extensions using WAP device through use of a pilot number programmed by admin
    - Address Book – Lookup Contact, Browse by Group, Add Contact (specify name and number)
    - Call Routing – Enable/Disable routing rules
    - Devices – View/Set DND and Forwarding for each of your devices
    - Passport – Edit your Microsoft .NET Passport (if Margarita is licensed)
- Phone-Client Enhancements
    - Get/set composite status
    - Barge in on TTS
    - Log off by saying "Goodbye"
    - Ability to include accounts in place-call search
    - Enable/disable routing rules
    - Review call log (Next, Previous, Return Call, Delete)
    - Enable/disable 'Handle my passport calls' option (if Margarita is licensed)
    - Auto logon when calling from an owned device or location
- PocketPC Client Supporting the following features:
    - Composite Status
        - View/change current
    - Devices
        - Add/remove device
        - View/change DND and Forwarding
    - Address Book (View/call/email contact)
    - Call Routing (Enable/Disable Rules)
    - Messages
    - Type-ahead search
    - Call List
    - Feature Codes
- Advanced IP Phone Client (Falcon) – Supports all of the features of the standard web client plus user-interface features specific to the operation of the phone.

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2.4.3.3.2 Alerts

The tray client is capable of alerting the user when certain events occur by scrolling a small window up from the tray-client icon in the system tray. The window contains information on the event that occurred, and it remains on the screen for a short period of time before automatically disappearing. The user can control what types of alerts he receives and how long the alerts remain on the screen though fields in the properties page which is described in a section below. The tray client is capable of alerting the user of the following types of events:

2.4.3.3.2.1 New Message Received

When the user receives a new station message or voicemail message on one of the devices associated with his account, the tray client will notify him of the new message received. The notification will indicate what type of message was received, which device it was received on, and who the message is from. If the new message is a voicemail message, then the alert will also indicate which mailbox the message was left in. While the alert is on the screen, the user can click on the alert message to bring up the messages area of the standard web client.

2.4.3.3.2.2 Incoming Call

When the user receives a new incoming call on one of the devices associated with his account, the tray client will notify him of the ringing call. This notification indicates whether it is an internal or external call, and who the call is from (if available). The notification also includes an answer button that the user can click to answer the call, and a send-to-voicemail button that the user can click to send the call directly to voicemail. The user can also click on the text of the notification itself to bring up the call-list area of the standard web client.

2.4.3.3.2.3 Contact Status Changed

The user can choose to monitor the status of contacts in his speed-dial list. Every time the composite status of one of these contacts changes, the tray client will notify the user of the contact's new status. The notification indicates the name of the contact whose status changed, and the contact's new composite status (description, availability, and location). The user can click on the text of the notification to bring up the speed-dial list on the standard web client.

2.4.3.3.3 Menu

When a user wishes to use the tray client, he simply right clicks (or left clicks) on the tray-client icon and a popup menu appears. This section describes the options available from the tray-client menu.

2.4.3.3.3.1 Exit

The user can select this menu option to exit from the tray client. If he has configured the tray client to prompt for confirmation on exit, then he will be prompted before the application closes. Refer to the 'Properties' section below for more information on this configuration option.

2.4.3.3.3.2 Properties

The user can select the properties menu option to view and configure the properties for the tray client. The properties dialog consists of three tabs: General, Alerts, and About.

2.4.3.3.3.2.1 General

The general tab allows the user to configure the general settings of the tray client. It consists of the following configuration fields:

Web address — This field specifies the Unified Communicator web URL which is typically 'http://<MACHINE>/UC'. This field is configured automatically by the standard web client during the tray-client installation, and should not need to be changed. The tray client uses this URL to retrieve configuration

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	information including settings that allow it to connect to the Unified Communicator server.
Username	This field stores the username of the user's account when the tray client is configured to automatically log the user in. If this field is blank, then the tray client will prompt the user for a username and password to log in.
Password	This field stores the user's password when the tray client is configured to automatically log the user in.
Log on when program launches	This checkbox allows the user to specify whether he wants the tray client to automatically log in to the Unified Communicator server every time the tray client launches. For the best ease of use, we recommend that the user fill in his username and password to enable this option. This will allow for more seamless integration between the tray client and the standard web client.
Start this program when Windows starts	This checkbox allows the user to specify whether he wants the tray client to automatically start every time Windows restarts. If this option is checked, then every time the user restarts his machine, the tray client will automatically start up.
Display confirmation dialog on exit	This checkbox allows the user to specify whether he wants the tray client to prompt for confirmation when the user chooses to exit the application.

2.4.3.3.3.2.2 Alerts

The alerts tab allows the user to choose which events he would like the tray client to notify him of. The user can enable or disable any of the following:

Display alert when new message arrives	If this option is checked, then the user will receive an alert when any of the devices owned by his account receives a new station or voicemail message.
Display alert when incoming call is ringing	If this option is checked, then the user will receive an alert when an incoming call rings in to one of his devices.
Display alert when contacts change status	If this option is checked, then the user will receive an alert when the composite status of one of the contacts in his speed-dial list changes.
Display the alert window for X seconds	This field allows the user to specify how long each alert remains on the screen before disappearing.

2.4.3.3.3.2.3 About

The about tab shows the following system information:

Product Version	This field indicates the overall Unified Communicator product version.
Client Version	This field indicates the current version of the standard web client and tray client installed on the user's machine.
Protocol Version	This field indicates the current version of the protocol that the Unified Communicator client is using to communicate with the Unified Communicator server.

2.4.3.3.3.3 Log On/Log Off

If the tray client is not currently logged in to the Unified Communicator server, then the 'Log On' menu item allows the user to log on his tray client. If the tray client is currently logged on to the Unified Communicator server, then a 'Log Off' menu item allows the user to log off his tray client.

2.4.3.3.3.4 My Status

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EXHIBIT C

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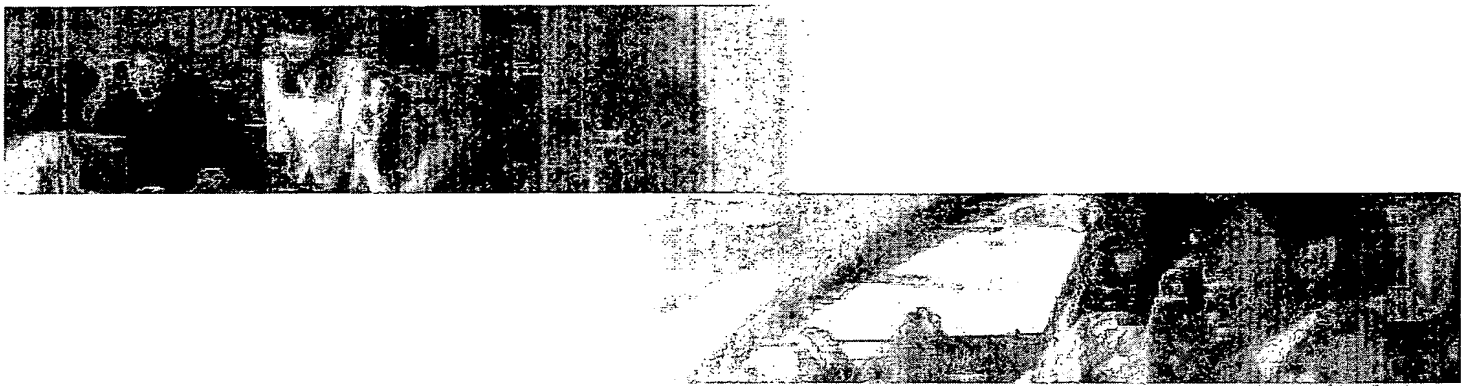

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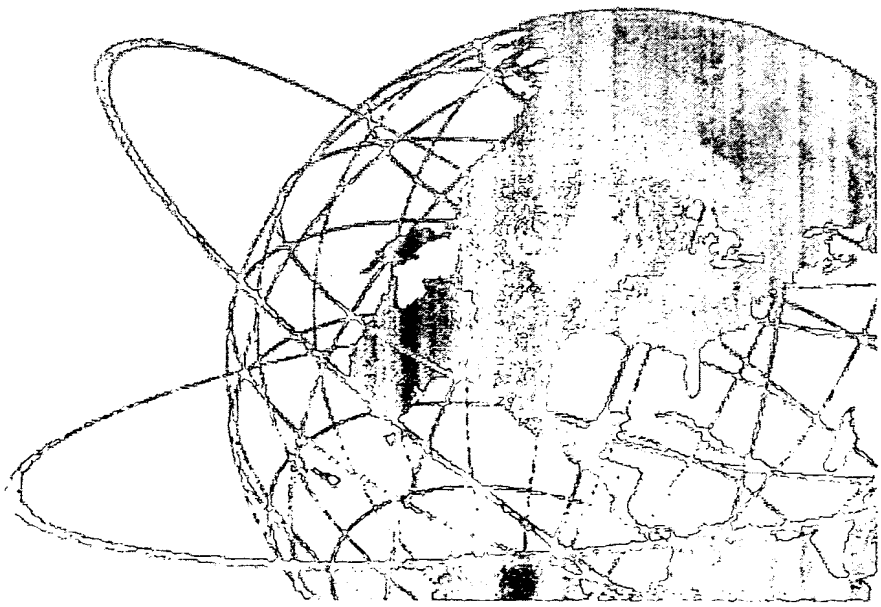

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Unified Communicator™

INSTALLATION AND CONFIGURATION MANUAL

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New Features and Enhancements

If you are familiar with Issue 1.1 of the *Unified Communicator™ Installation and Configuration Manual*, the following new items are documented in Issue 2.0 of this manual.

For architectural information on many of these new features, refer to "End-User Features" on page 5-1 and "Appendix B – Architecture" on page B-1.

A. STANDARD FEATURES

In this release, Unified Communicator™ (UC) provides the following standard features and capabilities:

- **Multiple device and client support**: Accounts support multiple devices such as standard phones, IP phones (including SIP-based IP phones and SIP-enabled devices), and clients such as the WAP client, PC clients, and PocketPC client.
- **Composite Status**: A composite status refers to a "user state" at any given time. This state encompasses a user's availability, their current location, the Do-Not-Disturb (DND) on any device(s), and a Windows Messenger status. When you change your composite status, all of these components of the user state are changed accordingly. Likewise, when you change the DND on a device, the new DND is matched to one of your composite status items, and the composite status is changed automatically. Composite status allows you to easily manage all individual status/location elements.
- **Groups support**: User-definable groups of contacts (i.e. "Friends") are used in call routing, to browse the address book and for access from a speed-dial list.
- **System message storage**: System events appear directly in the Messages View.
- **Interactive Call Log**: A Call Log view shows all incoming and outgoing calls. You can place a call from the call log, add call log entries to the address book, and view all call-log details.
- **Statistics**: Statistics on usage and significant system-wide events are available. Also, additional statistical enhancements are available to the Administrator Web Client.
- **Call Routing enhancements**:
  - — *Positive Caller ID*: An incoming caller can now be positively identified so the call follows an appropriate set of routing rules. Positive caller ID may include one or more of the following: address-book lookup, prompt for name, and prompt for number.
  - — *Custom Greetings*: User-created recordings can be played to callers during call routing.
  - — *List of user-programmable routing rules*: These rules define how incoming calls are routed. Each rule has the following characteristics:
    - **Who**: Defines to whom the rule applies.
    - **When**: Defines when the rule applies.
    - **What**: Defines what the rule does and what to do as a result of that rule.

- **Administrator Web Client enhancements** allow you to:
  - — Add, edit, delete account information, change/reset account password, enable/disable options for account management.
  - — Batch-edit accounts.
  - — Program and control nodes and devices.
  - — Access multiple programming views: accounts/external directories, logged-in accounts, devices/nodes (each of which can be viewed by ID or user-friendly name).
  - — Enable/disable devices to determine whether a UC account can use the device.
- **Standard Web Client enhancements** include a high-level toolbar that allows you to:
  - — See incoming calls, call indication, and perform basic call control.
  - — View your composite status or change it.
  - — Create speed-dial buttons that display the current status of each contact. Speed-dial buttons also allow you to quickly place a call, send station messages, or call voice mail for each contact in your speed-dial group.
  - — Access a feature-code favorites button for quick access to phone system feature codes.
  - — Access a type-ahead search field that automatically opens a list of search results from which you can see account and device status, place calls, send station messages, call voicemail, and view contacts.
  - — Place a call to a specific phone number.
  - — Display the last five outbound calls from the call log.
  - — Access an online tutorial.
  - — Shrink the user interface (UI). The Web client includes a collapse button that shrinks the UI to a toolbar, which is shown on your PC (optional) with an "always on top" attribute.
- **Call List enhancements** allow you to:
  - — Collapse the Call List. The Call List exists as a collapsible area on the main UI, not as a separate view. When placing a call or a call rings in, this area automatically opens.
  - — Show calls involving any configured devices.
  - — Show calls as they are being routed. The display indicates what is happening to the call.
  - — Show device DND for nonUC users. If a UC user calls the device of a non-UC user, and that device is in DND, the call list shows that the device is in DND and displays the DND message.
  - — Leave a station message or transfer to the device voicemail at any time while a call is ringing a device.
  - — Listen to a call as a group.
  - — Record any call you are on.
  - — Mute calls.
  - — Send incoming calls directly to voice mail.

- **Tray Client enhancements** allow you to:
  - — View scrolling pop-up messages indicate:
    - Incoming calls including caller identification and support for basic call control.
    - New station or voicemail messages received.
    - Contact status changes in a speed-dial list.
  - — Execute feature-code favorites.
  - — Enable/disable call routing.
  - — Set composite status.
  - — Redial the last five outbound calls from call log.
  - — Enable/disable "Handle my passport calls" option (requires a SIP Server license).
- **WAP Client enhancements** allow you to:
  - — View and set your current composite status.
  - — Access station, voice-mail or system messages.
  - — Station Message enhancements: You can retrieve the current status of a person or device that left a station message. You can then take the following actions: return the call, send a station message, leave voice mail, or delete the station message.
  - — Lookup contact (from Place Call or Address Book menus) displays a snapshot of the current status, and you can send station messages and leave voicemail.
  - — Using the Place Call menu, you can:
    - Browse for a contact and place a call using user-defined groups.
    - Specify a phone number you want to call.
    - View recent calls and return calls from within the Call Log.
    - Edit any number before dialing.
  - — Lookup Contact, Browse by Group, Add Contact (specify name, company, and number) from the address book.
  - — Enable/Disable call routing.
  - — View/Set DND and Forwarding for each of your devices.
  - — Edit your Microsoft .NET Passport (if SIP Server is licensed).

- **TUI/VUI enhancements**:
  - — Get/set composite status.
  - — Get/set DND status.
  - — Interrupt Text-to-Speech (TTS) prompts.
  - — Log off by saying "Goodbye."
  - — Include accounts in place-call search.
  - — Access and review the call log.
  - — Enable/disable call routing.
  - — Review call log (Next, Previous, Return Call, Delete).
  - — Hear the number of new station messages and from whom they originated.
  - — Return a station message by connecting your call to the given party.
  - — Hear the number of new voicemail messages and transfer to the voicemail system to retrieve the messages.
  - — Place a call by entering or saying a destination number. Also allows you to place a call by saying a name (looked up in the account list or user's address book) to retrieve the number and connect the call (i.e. "Call Bob").
  - — Browse your groups list and place calls from the groups list.
  - — Enable/disable *Handle my passport calls* option (if SIP Server is licensed).
  - — Gives you information, on the options available from your current menu, through voice-prompted help.
  - — Autologon when calling from an owned device or "My Account" phone number.
- **PocketPC Client** supporting the following features:
  - — View/change current composite status
  - — Rename devices, and view/change DND and forwarding options.
  - — View/edit contacts, and send E-mail to address book contacts.
  - — Enable or disable call routing.
  - — Retrieve messages.
  - — Perform type-ahead search or browse by group.

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1. INTRODUCTION

1.1 This chapter provides information on accessing, configuring, and using various components of the Unified Communicator™ (UC) product.

2. STANDARD WEB CLIENT OPERATION

2.1 This topic describes the Standard Web Client basic operation, including creating new accounts, starting/exiting, and uninstallation.

A. NEW ACCOUNT WIZARD

2.2 The New Account Wizard allows you to create a UC account. UC then manages all aspects of this account, including all interactions with the phone system.

NOTE: New users and previous UC 1.x users will need to create an account. UC 1.x account information will then be migrated over to UC 2.0.

ALSO: Always exit the tray client before upgrading. If the tray client is running when a new version is downloaded and installed by the Standard Web Client, you are prompted to restart your computer before the new Tray Client version will be available.

Account Data Migration from UC 1.x

2.3 When the new account wizard associates each device with a new account, it checks to see if there was an old UC 1.x account in existence for that device (data can be migrated for each device). If there is, the wizard automatically migrates the old data to the new account. This process may occur multiple times if you are associating more than one device that used to exist as an account in UC 1.x. When the old data is migrated, the following occurs:

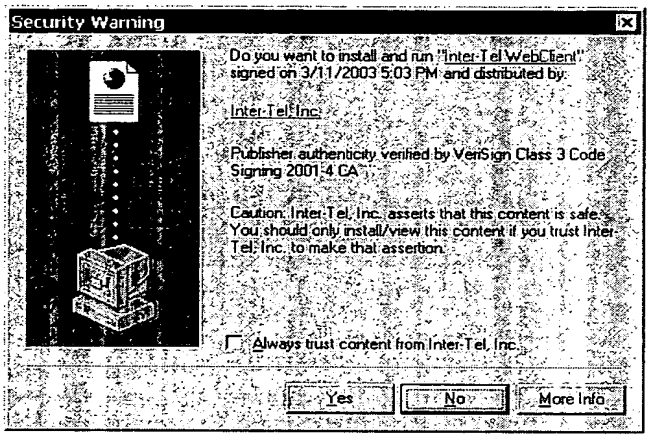
- All of the contacts in the UC 1.x account are added to the address book of the new account. When migrating an existing linked contact, UC attempts to find a UC 2.0 account to which it can link the UC 1.x contact. It is possible, however, that the given account might not yet exist since UC 2.0 users must create accounts themselves (using the new account wizard). If this is the case, the linked contact is migrated to UC 2.0 as a contact linked to the given device on the system.
- All monitor list contacts in the UC 1.x account are added to the speed-dial list of the new UC 2.0 account.
- For each location in the location list of the UC 1.x account, UC 2.0 creates two new composite status entries: one for available and one for unavailable. For example, if it finds a location called "Home, 555-1212," it creates the following two new composite status entries:
  - *Description*: Home – Available
    Availability: Available
    Location: 555-1212
    DND(s): OFF
    MSN Status: <Default Available>
  - *Description*: Home – Unavailable
    Availability: Unavailable
    Location: 555-1212
    DND(s): DO-NOT-DISTURB
    MSN Status: <Default Unavailable>
- The personal information for the UC 1.x account is used to pre-populate the fields in the next step of the new-account wizard. If you have migrated data from more than one UC 1.x account, then the personal information used will be that of the last device migrated.

Procedure

2.4 To create a new UC account:

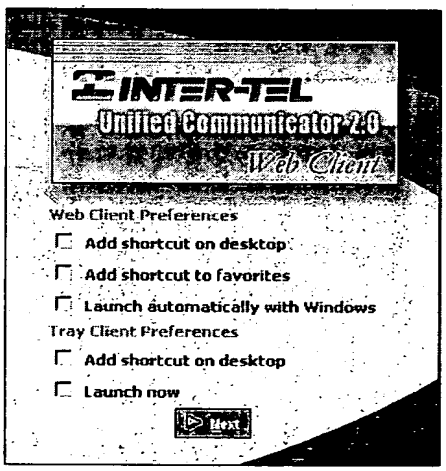
1. On the end-user computer, make sure the Tray Client is not running. Right-click the Tray Client and select **Exit**. Respond to the prompt that appears.
2. Navigate to the **http://<COMPUTER_NAME>/UC/** Web address, where <COMPUTER_NAME> is the UC server computer.

   You are prompted to download an ActiveX control, as shown below. This control contains the information required to run the Standard Web Client.



3. Click **Yes**.
4. *If this is not the first time running the Standard Web Client*, proceed to step 7.

   If this is the first time running the Standard Web Client, the following preferences screen appears.



NOTE: If this was not the first time the Standard Web Client has run on this computer, you would have been taken directly to the logon screen.

5. Select from the following options:

   - **Web Client Preferences**
     - *Add shortcut on desktop.* Adds a shortcut to the Standard Web Client on the desktop. When you run this shortcut, it launches a Web browser and automatically navigates to the Standard Web Client Web address.
     - *Add shortcut to favorites.* Adds the Web address for the Standard Web Client to the browser favorites list.
     - *Launch automatically with Windows.* Adds a shortcut to the Standard Web Client in the Windows startup folder. Every time Windows starts, it will launch the Web browser and automatically navigate to the Web address for the Standard Web Client. If, at a later time, you do not want the Standard Web Client to launch automatically when Windows starts, navigate to the startup folder on your computer and remove the Unified Communicator Web Client shortcut.
   - **Tray Client Preferences**
     - *Add shortcut on desktop.* Adds a shortcut to the Tray Client on the desktop. When you run this shortcut, it launches the UC Tray Client application.
     - *Launch now.* When this option is checked, clicking Next launches the Tray Client automatically.

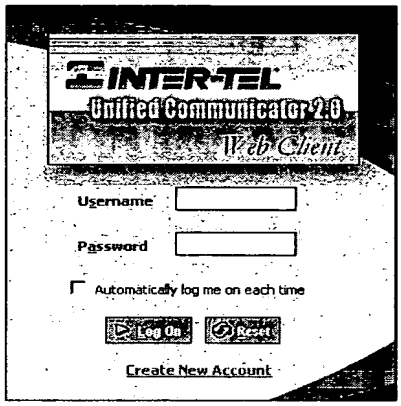
     Once shortcuts are installed, they are automatically updated with any changes to the UC Web address. Consider the following example:

     > You run the Standard Web Client for the first time from the Web address http://initial_computer/uc/, and the preferences screen appears. You choose to install one or more shortcuts. Later, an administrator decides to change the computer name or IP address of the UC server computer. UC is now hosted at http://new_computer/uc/. The first time you navigate to this new Web address, the Standard Web Client recognizes that the Web address has changed, and it automatically updates all of the shortcuts that you chose to install during your first session. Shortcuts will always point to the correct Web address. All installed shortcuts are removed if you choose to remove the Standard Web Client from your computer.

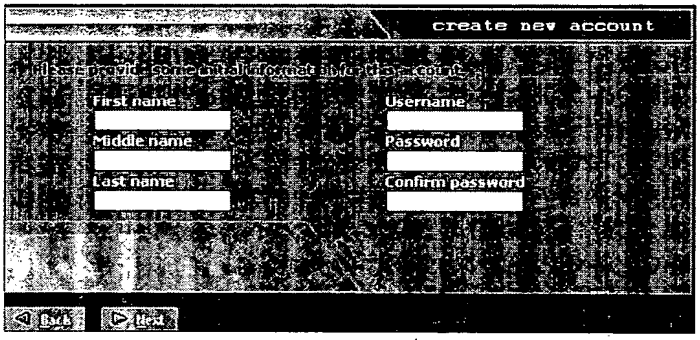
6. Click **Next**.

   The required components are automatically downloaded and installed. Shortcuts are automatically created (to the Standard Web Client and the Tray Client) in Start – Programs – Inter-Tel – Unified Communicator and on the desktop.

The UC logon screen appears (shown below). If the controls have been downloaded and installed during a previous session, they will not be downloaded again unless a newer version is available.



7. Click the **Create New Account** link at the bottom of the UC logon screen. The following screen appears.



8. Provide initial account information. This information is for use in UC to identify this account and to provide enduser access to the account information.

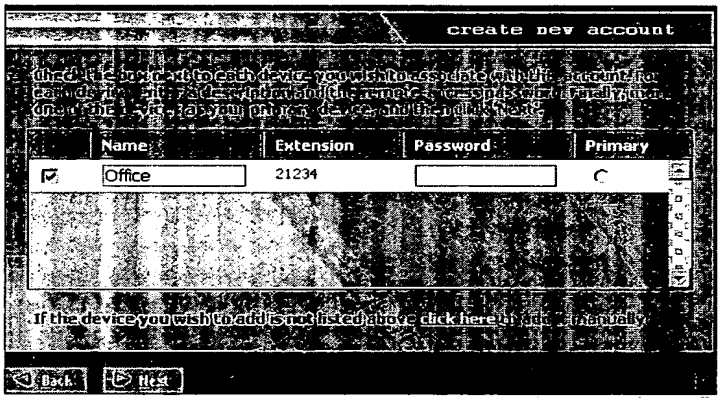
   - Enter a **First**, **Middle**, and **Last** name for this account user. All three fields cannot be blank; at a minimum, one field must be filled in.
   - Enter a **Username** and **Password** for this account user. Enter the password again to confirm. This is the username and password you will use to log in to the Standard Web Client.

   NOTE: The username cannot be blank, and it cannot match any existing usernames already on the system either alphanumerically or numerically. In reference to numerically, these are the digits you would press on a dial pad to spell out your username. When entering a username on the dial pad, you can simply press the digit corresponding to each letter of your username (e.g., to enter "johnsmith" would be "564676484"). If you use this mechanism to enter your username when logging on to the TUI/VUI phone client, UC checks that all usernames are numerically unique. For example, if an existing account has a username of "johnsmith," then a user could not create a new account with a username of "logosmith" because someone could enter that same username from the dial pad. As such, all usernames must be unique; there cannot be two accounts with the username "johnsmith" or numeric equivalent.

- *If there is more than one tenant group configured in the system,* select the tenant from the drop-down list. Your account is created in this tenant group.

  If there is only the default tenant group, or one tenant group in the system, you will not be prompted.

- Click **Next**. The following screen appears.

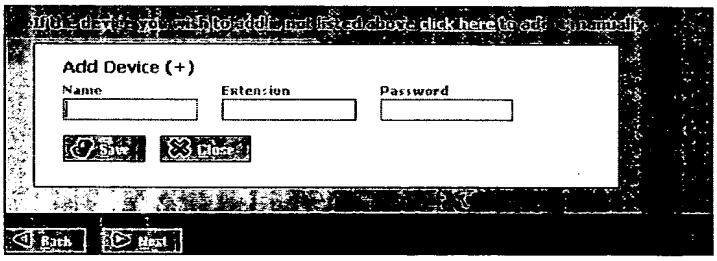


9. Follow the instructions, as indicated in the wizard above.

   - Click the check box next to each device you want to include in your account. UC searches for all PBX devices programmed with a similar description or username, and presents the results to you. You can then select each device you want to associate with your account. You can always add devices later through the Standard Web Client (see page 5-47).

   NOTE: Only phones on the phone system can be added as devices.

   - Indicate a password for each device you have added to your account. For each device, provide the remote-access password of the device to add it to your account. An error prompt appears if you provide the wrong password for the device.
   - Click the radio button next to the device you want to designate as your primary device. For information on primary devices, refer to "Devices" on page B-21.
   - If one of your phones does not appear in the list, select **click here** to add the device manually. The following screen appears.

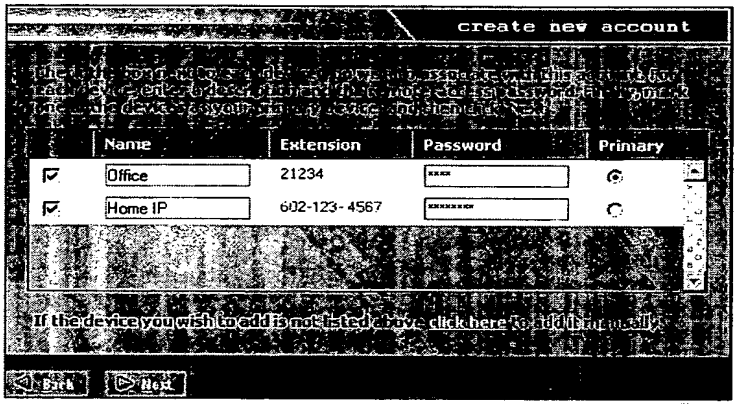


     – In the Add Device panel, provide a Name, Extension, and Password for the device you want to add.

     NOTE: A device can only be associated with one account at a time. If you choose to add a device that is already associated with another account, the attempt fails and an error message appears.

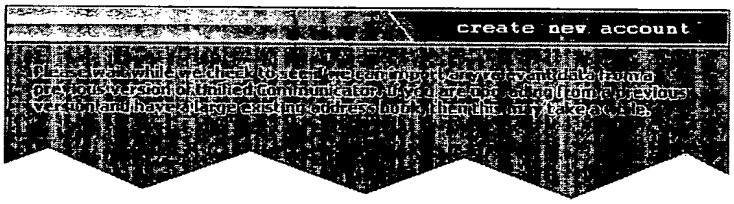
- Click **Save**. The device information moves to the top panel, is automatically selected as a device you want to activate, and the Add Device panel is cleared so you can add more devices. If you associate more than one device with the account, you are prompted to designate one of the devices as the primary device.
- When finished adding devices, click **Close**.

  You return to the following screen.



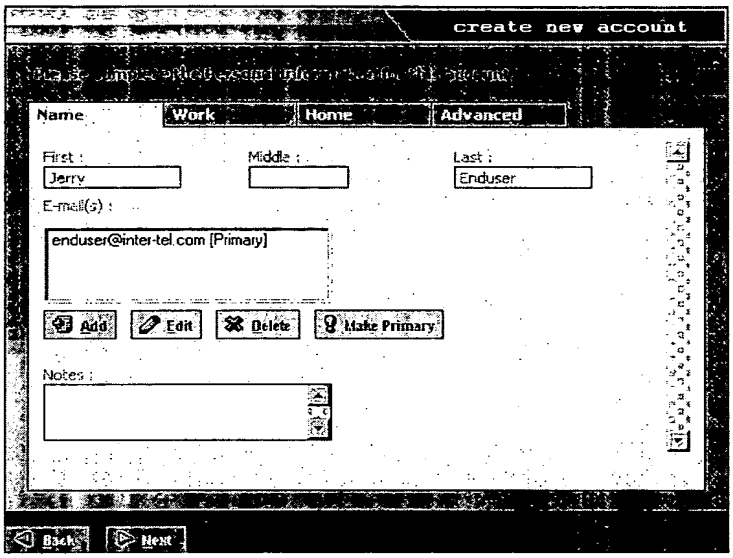
NOTE: If you have not associated a device with your account, a warning appears. You can complete the wizard, but the new account will initially be disabled and you will not be able to log on. This is a security measure to prevent people from creating a vast number of accounts on the system. Users who associate at least one device with their account have provided a remote-access password for the device to authenticate themselves as a phone-system user. If you do not have any devices, UC will still function, however, an administrator must enable your account prior to use. When you receive this warning, you have a choice to go back and add a device or continue with the wizard.

10. Click **Next**. The following message screen appears.



NOTE: If any errors occur during the above process or if a device cannot be located, you are notified in a prompt. Click OK to acknowledge the prompt and continue, or check to see that the device is connected to the system and either run the wizard again or add the device later using the Standard Web Client (see page 5-47).

The following screen appears after UC checks for devices and imports any previous UC information (if a previous UC version exists).



This is the starting screen after your account is created. You can now edit information for your account. If account data was migrated over from a prior UC installation, the above fields are prepopulated with information based on the migrated data. The wizard also prepopulates the work phone number (Primary field) with your primary device extension.

11. Click **Next** to begin using the Standard Web Client. Refer to the beginning of the chapter, "End-User Features" on page 5-1, for a list of tasks you can perform.

    The tutorial help screen appears. Close this window, upon completing the tutorial, to return to the Standard Web Client.

NOTE: If you have associated at least one device with your account, you are automatically logged on. If you have no devices associated, you are informed your account is disabled and you return to the logon screen. The system administrator is always informed, through a system message, whenever new accounts are added.

B. STARTING THE STANDARD WEB CLIENT

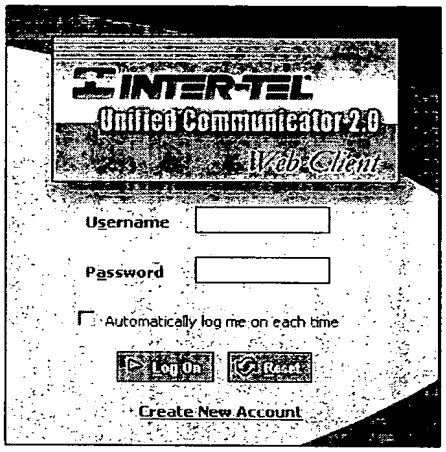
2.5 As with most other UC Web clients, the Standard Web Client component is automatically downloaded and installed. Once an account has been created, you can begin using the Standard Web Client.

2.6 To launch the Standard Web Client:

1. *If you have run the Standard Web Client before*, for example after having created an account, select Start – Programs – Inter-Tel – Unified Communicator – **Unified Communicator Web Client**, or click the Unified Communicator Web Client short-cut icon on the desktop (if you selected to add this option the first time you ran the client).

   If this is the first time you have run the Standard Web Client, refer to step 2 on page 5-6.

   The UC logon screen appears.



2. Enter a **Username** and **Password**. Remember this username and password pair because you will need it each time you log in. If you check the option Automatically log me in each time, this login screen will not appear the next time you run the Standard Web Client (recommended), and you will not be prompted for the username/password pair.

NOTE: Disabling automatic logon. Click the Logoff button from the main Web client window. The logon screen appears and you can enter a new username/password, and choose whether or not to check the box to save the new logon information. The auto-logon feature allows for seamless integration with the UC Tray Client.

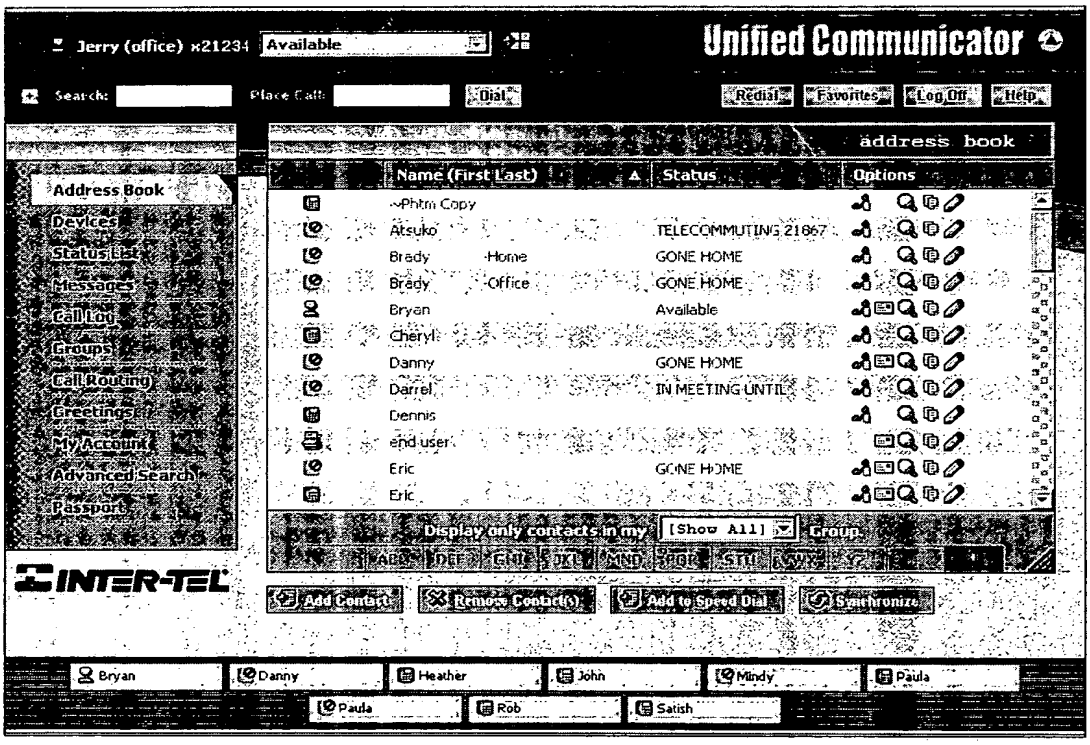
If the username/password pair does not exist or you enter the wrong username/password pair, an error message appears and you are given another opportunity to log in. After three failed login attempts, an error message appears and the browser closes. Notify your system administrator or a standard administrator that has full permissions on the tenant group to which you belong, to reset your password.

NOTE: To avoid security issues, it is recommended you NOT leave the Password field blank when logging in, and do not write the password where it can easily be accessed (for example, a "sticky note" attached to the monitor.

3. Click **Log In**.

NOTE: There can be only one account instance logged in to the system using a given client type (Standard Web Client, Tray Client, WAP Web Client, PocketPC Client, TUI/VUI phone client, or Administrator Web Client, if you have administrator permissions) at a time. For example, account "Bob" can be logged in from a Standard Web Client and Tray Client at the same time, but the account cannot be logged on from two Standard Web clients at the same time. If you try to log in and your account is currently logged in under the same client type, then you receive an error message. You are given the option of forcing the other account instance off the system so your new logon can proceed, or you can choose to log in using a different account.

After a status screen indicates you are connecting to the server, the Standard Web Client appears in the browser window.



2.7 You are ready to begin using the Standard Web Client. Refer to the beginning of the chapter, "End-User Features" on page 5-1, for a list of tasks you can perform.

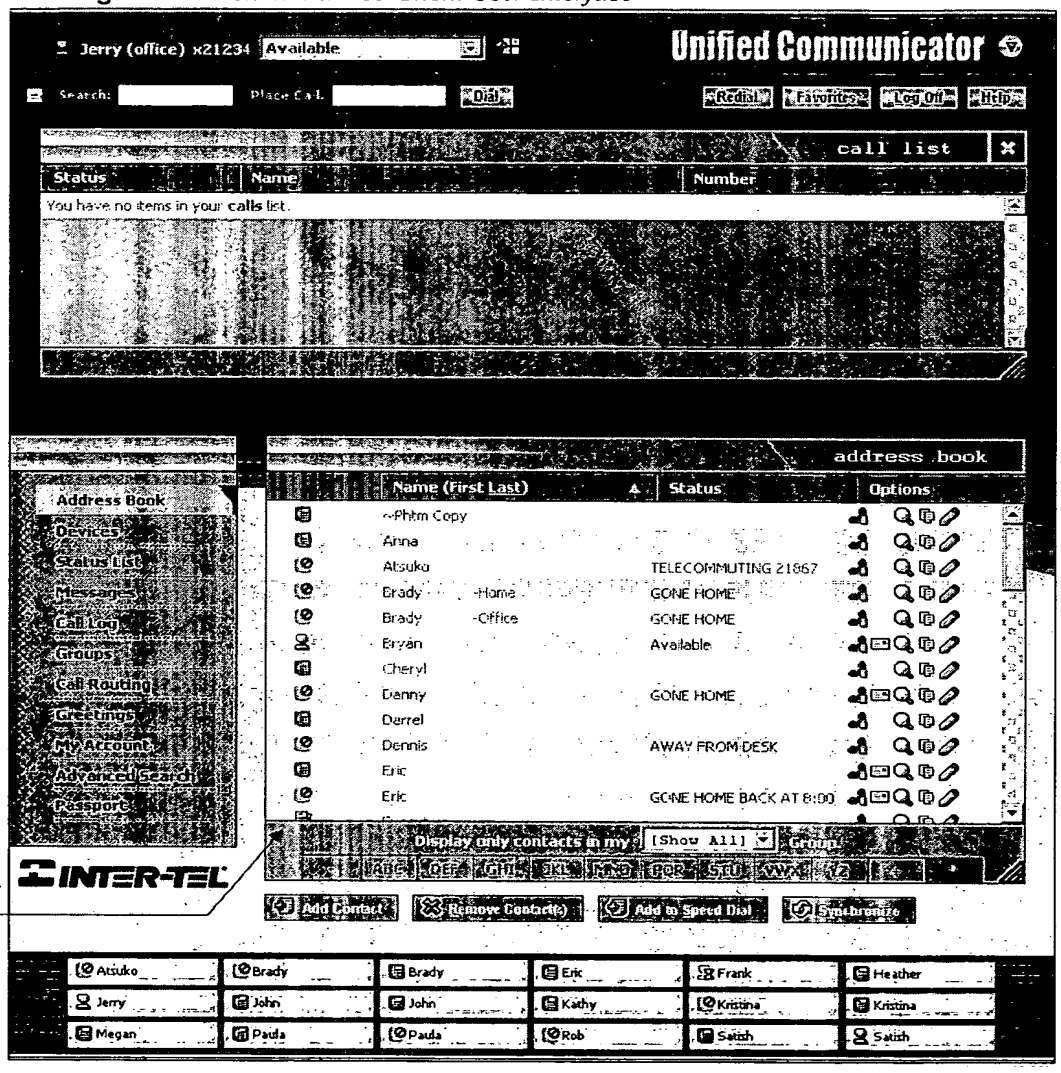
NOTE: When the Standard Web Client starts, the menu bar is automatically removed from the browser. This is to prevent using the File – New – Window command from the UC browser to launch a new browser window. Starting a new browser window in this manner, then running UC clients from both browser windows, can potentially cause problems.

C. USER INTERFACE

2.8 The Standard Web Client provides a Web-based user interface. The user interface consists of views that allow you to program different areas of the product.

2.9 Once you have successfully logged in, the Standard Web Client user interface appears as shown in the example below. The user interface consists of a status panel along the top of the screen, a toolbar panel, a navigation panel along the left side of the screen, a speed-dial list on the bottom of the screen, and the current view filling the remainder of the screen. The window title bar displays the current UC product name and version, your name and the username you used to log in (e.g., Unified Communicator 2.0.0.19 - Joe Enduser (joenduser).

Figure 5-1. *Standard Web Client User Interface*



2.10 All of the user-interface items shown above are discussed in "Standard Web Client Features" on page 5-16.

D. EXITING THE STANDARD WEB CLIENT

2.11 To exit the Standard Web Client, use any of the following methods:

- Close the browser window
- Navigate to a different Web address
- Refresh the browser window. This returns you to the logon screen.

2.12 Any of the above actions automatically logs you off the system.

E. LOGGING OFF THE STANDARD WEB CLIENT

2.13 To log off the Standard Web Client:

Click the **Logoff** button at the top of the Standard Web Client window. This returns you to the logon screen.

NOTE: If you have chosen to save your logon information and have the client automatically log in for each session (refer to step 4 on page 5-6), then clicking the Logoff button also clears the saved logon information.

F. UNINSTALLING THE STANDARD WEB CLIENT

2.14 The preferred way to remove the Standard Web Client is to use the uninstall program. You can also use Windows Explorer. Also, the Tray Client is automatically removed when you uninstall the Standard Web Client.

Using the Uninstall Program

2.15 When the Standard Web Client is installed, an uninstall program is also installed. The uninstall program exists in the same location in which the client components are installed. The install location depends on the client operating system:

2.16 The first time the Standard Web Client is run, a shortcut to the uninstall program is placed in the Start menu under `Programs\Inter-Tel\Unified Communicator`.

2.17 To uninstall the Standard Web Client:

1. Select Start – Programs – Inter-Tel – **Unified Communicator**.
2. Select **Unified Communicator Client Uninstall**, and follow the prompts.

Using Windows Explorer

2.18 To remove the Standard Web Client using Windows Explorer:

1. Launch Windows Explorer and open the following folder (based on your operating system):
   - *Windows 98, Windows ME, Windows XP*
     `C:\Windows\Downloaded Program Files`
   - *Windows NT, Windows 2000*
     `C:\WinNT\Downloaded Program Files`
2. Right click the `Inter-Tel Unified Communicator Client` item in this folder and select **Remove** from the shortcut menu. The Standard Web Client and all shortcuts, that were added during the initial installation, are removed. The next time you navigate to the specified Web address to launch the Standard Web Client, the application is installed through the ActiveX control. At that time, you will have the opportunity to reinstall the shortcuts.

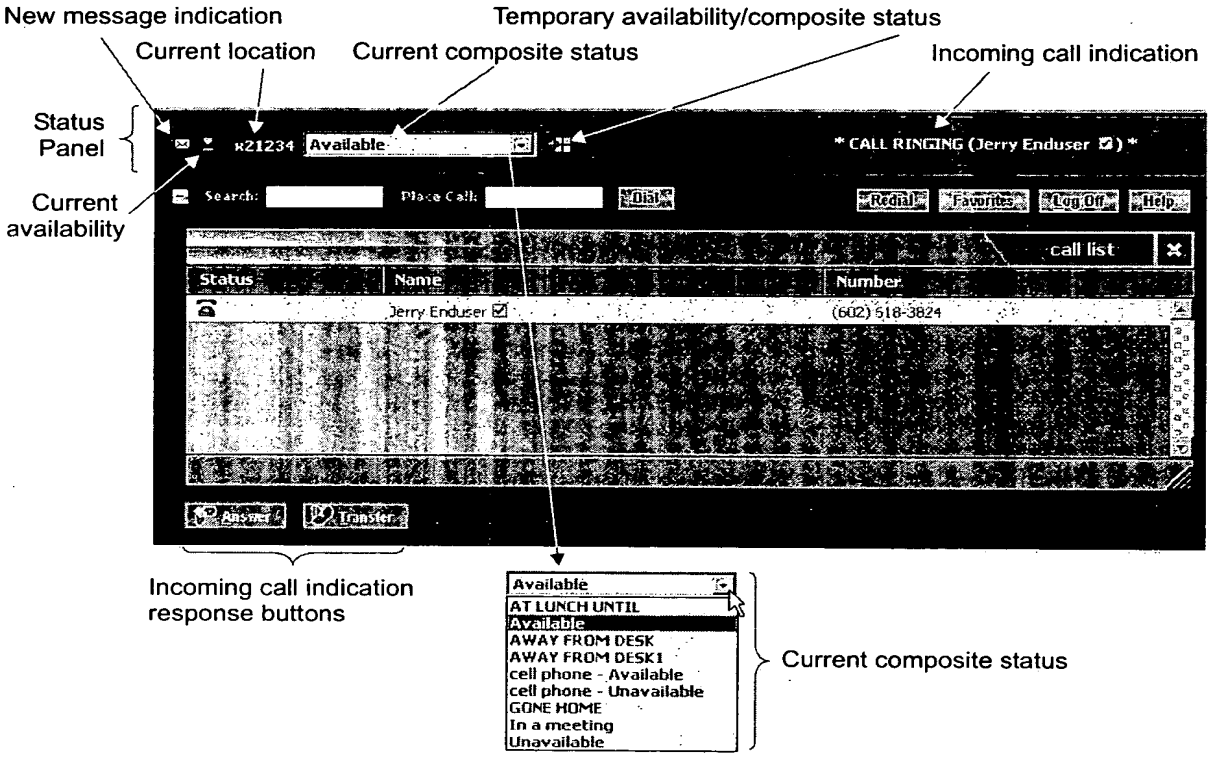
3. STANDARD WEB CLIENT FEATURES

3.1 After becoming familiar with "Standard Web Client Operation" on page 5-5, you can begin working with features. For a complete list of feature-related tasks you can perform, refer to "End-User Features" on page 5-1.

A. STATUS PANEL

3.2 The status panel occupies a strip across the top of the browser window, as shown in the example below. You can perform the following tasks from the Status Panel:

Figure 5-2. *Status Panel*



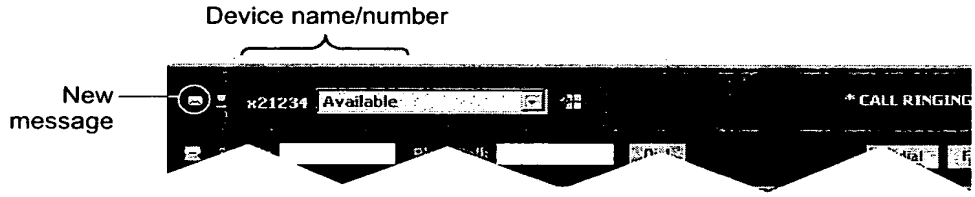
3.3 The status panel is always present regardless of the current view displayed.

NOTE: Availability refers to the true/false state of availability for an account. An account is either available or not available. It is important to not confuse availability with the Do-Not-Disturb (DND) status supported by devices on the phone system. A DND status is associated with a device, and you can have multiple devices associated with your account. By contrast, an account has only one availability status. If call routing is enabled in the Call Routing view (see page 5-61), you will receive calls while in DND.

View/Check Messages

3.4 You can view or check messages either through the status panel or from the Messages link on the navigation panel (see page 5-54).

3.5 When you have one or more new messages (station, voicemail, or system), an envelope icon appears in the upper-left corner of the status panel.



NOTE: When you open the Messages view, the new message icon is removed, even though you still have messages in the view area. The new message icon is only present if you have received a new message you have not yet viewed.

3.6 To view or check incoming messages from the status panel:

1. Click the message icon next to your name in the status panel to open the Messages view.
2. From the Messages view list of unread messages, click the link in the **From** column. The following message types and icons may be displayed:
   - Station Message : Click to call originating station or device.
   - Voice-Mail Message : Click to call voice-mail. You cannot delete voice-mail messages through UC. You must delete them using the voice-mail system.
   - System Message : The message is displayed.

Check Current Location

3.7 To check your current location:

Locate the "device name/number in the status panel, as shown in the example above.

Refer to "Locations" on page B-16 for additional information.

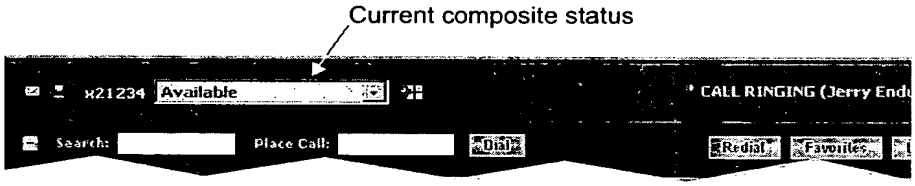
View/Set Composite Status

3.8 A composite status refers to a state you are in at a given time. This state encompasses your current availability, current location, and the DND on your device(s). When you create a composite status, you give the status a descriptive name. You then define the state of each of these components. When you change your current composite status to a selected status, all of these components are set accordingly. Refer to "Composite Status" on page B-12 for additional information behind the composite status concept.

NOTE: Availability refers to the true/false state of availability for an account. An account is either available or not available. It is important to not confuse availability with the Do-Not-Disturb (DND) status supported by devices on the phone system. A DND status is associated with a device, and you can have multiple devices associated with your account. By contrast, an account has only one availability status. If call routing is enabled in the Call Routing view (see page 5-61), you will receive calls while in DND.

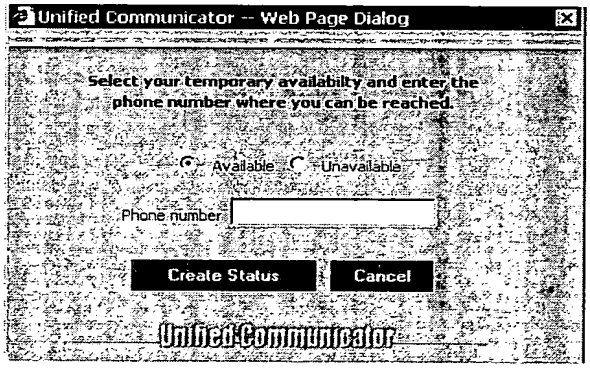
3.9 To view/set current composite status:

Select a composite status from the drop-down list.



3.10 To set temporary composite status:

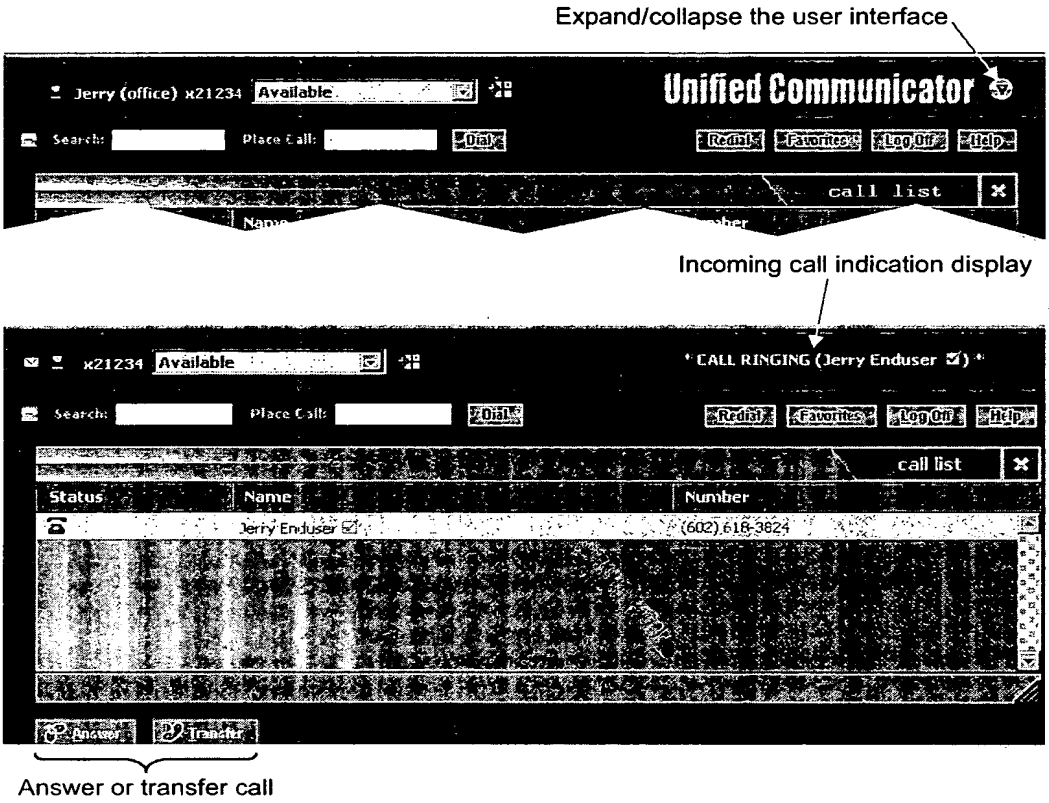
1. Click the temporary composite status icon, to the right of the current composite status drop-down list (shown above). The following dialog appears.



2. Enter a phone number and indicate your status as Available or Unavailable.
3. Click **Create Status**.

View/Answer/Transfer Incoming Calls

3.11 When the Standard Web Client is idle, the status panel displays the product name and an expand/collapse button, as shown below.

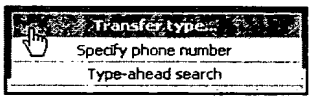


When an incoming call rings in, the product name is replaced by an incoming-call indication display. This informs you there is an incoming call, and it specifies the caller ID (if available).

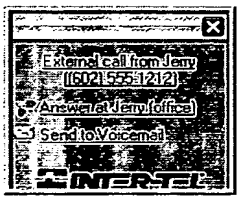
3.12 To answer or transfer an incoming call:

To answer the call, pick up the receiver, or click the **Answer** button at the bottom of the call list.

To transfer the call, click the **Transfer** button, then select either of the following options from the menu at right.



- **Specify phone number**: Enter the phone number to which you want to transfer the call.
- **Type-ahead search**: Opens the search screen and displays search results as you type. Upon locating the desired name/number, select it and the call is transferred to that number.



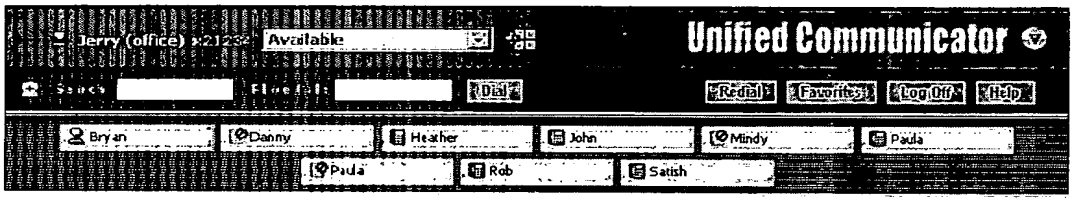
If you are running the Tray Client, a popup alert window appears, allowing you to answer the call or send it to voicemail. This requires you to configure Tray Client properties to alert you to incoming calls. Refer to "Setting Tray Client Properties" on page 5-81 for information.

Expand/Collapse the User Interface

3.13 The status panel includes an expand/collapse button, at the top right corner of the window, that allows you to collapse the Standard Web Client interface down to a small area that consists of the status panel and the toolbar panel (Figure 5-1 on page 5-14). If you have entries in your speed-dial list group, these are also displayed. In collapsed mode, you can still access the core features through the toolbar, and you can monitor the real-time status of your speed-dial list.

3.14 To expand/collapse the user interface:

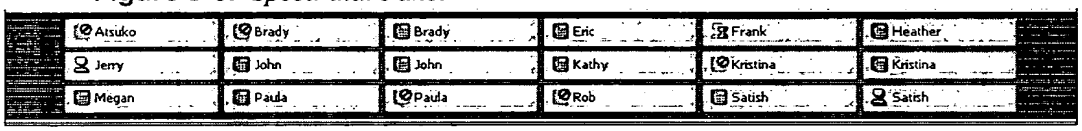
Click the expand/collapse button at the top right of the window. Click the button again to return the client to original size. Performing a search or clicking on an incoming call notification automatically expands the user interface. An example of a collapsed user interface is shown below.



P. SPEED-DIAL PANEL

3.140 The Speed-dial panel provides quick access to all entries in your speed-dial group list. An example of the Speed-dial Panel is shown below.

Figure 5-6. *Speed-dial Panel*



3.141 A speed-dial group was installed automatically when you created your account. If there are no contacts in your speed-dial group, speed-dial buttons do not appear at the bottom of the browser window.

3.142 Speed-dial buttons display the name and real-time status of each contact in your Speed Dial group. To see the real-time status, mouse over the icon, or you can optionally choose to display the textual status of each account/device in your speed-dial list (in a second line on the button). The latter option takes up more space. You can control this preference from the Advanced tab of the My Account view (see page 5-70).

Icon Status

3.143 This column displays the real-time status for the contact (if any) in icon format. Only linked accounts and linked devices will display anything in this area. This area may include one or more of the following icons:

- Indicates the account is currently available.
- Indicates the account is currently unavailable.
- Indicates the DND of the device is currently OFF.
- Indicates the DND of the device is currently enabled.
- Indicates the device is currently on a call.
- Indicates the account/device is currently on a call.

Textual Status

3.144 Real-time status can also be displayed for the contact in text format. Only linked accounts and linked devices will display anything in this area. The information displayed depends on the type of contact as follows:

- **Linked Account**: Displays the description of the account's current composite status.
- **Linked Device**: Displays the device's current DND message.

D. EXITING THE TRAY CLIENT

4.7 To log off the Tray Client and Exit:

1. Right-click the Tray Client icon and select **Exit**.
2. *If Tray Client properties were not set to prompt* you when exiting, the Tray Client closes.

   If Tray Client properties were set to prompt you upon exiting, select **Yes** from the prompt that appears.

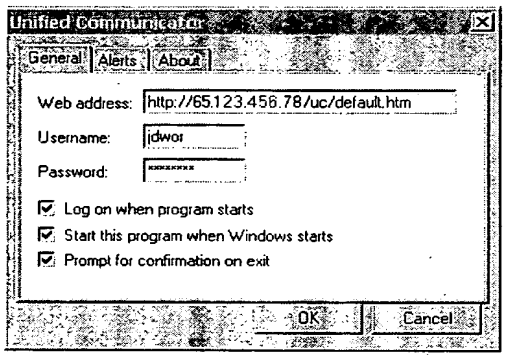
E. REMOVING THE TRAY CLIENT

4.8 The Tray Client is automatically removed when you uninstall the Standard Web Client. Refer to "Uninstalling the Standard Web Client" on page 5-15.

F. SETTING TRAY CLIENT PROPERTIES

4.9 To set Tray Client properties:

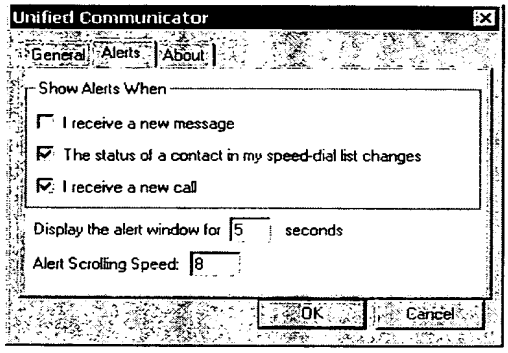
1. Right-click the Tray Client, and select **Properties** from the menu. The dialog box at right appears.



2. Set or change the following **General** tab options:

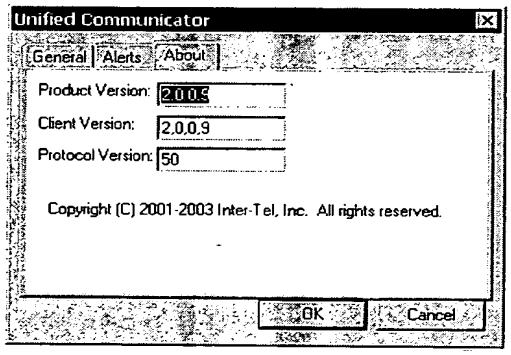
   - **Web address**: This field should not need to be changed. It specifies the UC Web address (`http://<MACHINE>/UC`). The Standard Web Client configures this field automatically during the tray-client installation. The Tray Client uses this Web address to retrieve configuration information including settings that allow it to connect to the UC server computer.
   - **Username**: Stores your username when the Tray Client is configured to automatically log in. If this field is blank, the Tray Client prompts you for an username and password.
   - **Password**: Stores your password when the Tray Client is configured to automatically log in.
   - **Log on when program starts**: (Recommended) Specify whether or not you want the Tray Client to automatically log in to UC every time the tray client launches. It is recommended you fill in your username and password and enable this option. This allows for seamless integration between the Tray Client and the Standard Web Client.
   - **Start this program when Windows starts**: Specify whether or not you want the Tray Client to automatically start every time Windows starts. If this option is checked, the Tray Client starts every time you start your computer (recommended).
   - **Prompt for confirmation on exit**: Specify whether or not you want the Tray Client to prompt for confirmation when you exit the application.

3. Click the **Alerts** tab, then set or edit the following options:



   - **Show Alerts When**:
     - *I receive a new message*: You receive an alert when any of the devices owned by your account receives a new station or voicemail message.
     - *The status of a contact in my speed-dial list changes*: You receive an alert when the account status or device DND of one of the contacts in your speed-dial list changes.
     - *I receive a new call*: You receive an alert when an incoming call rings in to one of your devices.
   - **Display the alert window for <n> seconds**, where <n> is the number of seconds each alert is visible before disappearing. Enter a value between 1 and 60. Default is 5.
   - **Alert Scrolling Speed <n>**: Controls the scrolling speed, between 4 and 30, for the alert window. The higher the number, the faster it scrolls. Default is 8.

4. Click the **About** tab to view version information, as shown at right.



   The following version information is provided:

   - **Product Version**: Indicates the overall UC product version.
   - **Client Version**: Indicates the current Standard Web Client version and Tray Client installed on your computer.
   - **Protocol Version**: Indicates the protocol version the UC client is using to communicate with the UC Server application.

G. STANDARD WEB CLIENT AND TRAY CLIENT INTERACTION

4.10 The Standard Web Client and Tray Client are tightly integrated to provide greater usability. It is recommended you set both to autologin and the Tray Client to launch automatically at Windows startup (refer to see page 5-7 for details).

4.11 There can be only one account instance logged in to the system using a given client type (Standard Web Client, Tray Client, WAP Web Client, TUI/VUI phone client, or Administrator Web Client, if you have administrator privileges) at a time. For example, account 1000 can be logged in from a Standard Web Client and Tray Client at the same time, but the account cannot be logged on from two Standard Web clients at the same time. If you try to log in and your account is currently logged in under the same client type, then you receive an error message. You are given the option of forcing the other account instance off the system so your new logon can proceed, or you can choose to log in using a different account.

N. MESSAGES SHORTCUT

4.31 The Messages menu item opens the Standard Web Client to the Messages View. If you have one or more new messages, an icon appears next to the Messages menu item to indicate there are new messages.

4.32 Refer to "Messages View" on page 5-54 for information on working with messages.

O. ADDRESS BOOK SHORTCUT

4.33 The Address Book menu item opens the Standard Web Client to the Address Book view. Refer to "Address Book View" on page 5-28 for information on working with your address book.

P. CALL LOG SHORTCUT

4.34 The Call Log menu item opens the Standard Web Client to the Call Log View. Refer to "Call Log View" on page 5-56 for information on working with call logs.

Q. WEB CLIENT SHORTCUT

4.35 The Web Client menu item opens the Standard Web Client and places the cursor in the type-ahead search edit box on the main toolbar.

4.36 Refer to "User Interface" on page 5-14 to begin working with the Standard Web Client.

R. TRAY CLIENT ALERT POPUP WINDOW

4.37 The Tray Client can display alerts when you receive events while logged in to UC. An alert is a small window that scrolls onto the screen from the system tray. An example of an alert window is shown at right.

4.38 The alert window displays an informational message and can optionally include one or more buttons that you can click to perform an action related to the alert. Once the alert has scrolled completely onto the screen, it remains on the screen for a few seconds, then scrolls off the screen and disappears.

4.39 If you want to get rid of an alert window quickly, click the "X" in the upper-right corner to close it at any time. You can control alert types you receive through the Tray Client properties. Refer to "Setting Tray Client Properties" on page 5-81 for more details. You will only receive alerts while logged on to UC. The following alert types are discussed below.

New Message Received

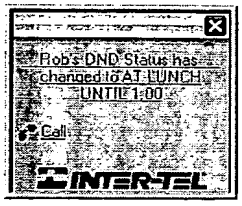
4.40 This alert appears when you receive a new station message or voicemail on any of your devices owned by your UC account. This alert indicates the type of message received. If it is a station message, the alert indicates who left the message, and it includes a button you can click to place a return call to that person. If it is a voicemail message, the alert indicates the mailbox to which the message was delivered, and it includes a button you can click to call that mailbox and retrieve the message. An example of this alert popup is shown in the example above.

Incoming Call

4.41 This alert appears anytime you receive an incoming call on one of your devices owned by your account. This alert indicates the identity of the caller (if available), and it includes buttons you can click to answer the call or to send the call to voicemail. The name/number of the caller that is displayed on the alert is not just the information received from caller ID on the call. Because you are using UC, your address book and potentially positive caller ID have been used to determine the caller identity. An example of this alert window is shown above.

Status Changed

4.42 This alert appears anytime the status of someone in your UC speed-dial list changes. If the contact in your speed-dial list is a device, the alert indicates the person whose status changed and the new DND status of the that device. If the contact in your speed-dial list is an account, the alert indicates the person whose status changed and the account's new status description. In either case, the alert also includes a button you can click to place a call to the person whose status changed. An example of this alert type is shown at right.



5. WAP WEB CLIENT FEATURES

5.1 Through the WAP Web Client (and a WAP-enabled device with internet access), you can gain access to UC features offered for the phone system. The following WAP Web browsers are supported:

- The Openwave (formerly Phone.com) Mobile Browser 3.1 and above.
- Motorola Microbrowser

NOTE: The Motorola browser is incapable of displaying the following characters: ` { } |

If one of these characters appears in any UC dynamic text, it is replaced by the following corresponding characters prior to display:
' [ ] !

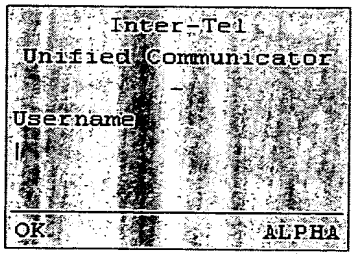
5.2 Refer to "WAP Web Client" on page B-5 for overview and architecture information.

5.3 Refer to the beginning of the chapter for a list of tasks you can perform using the WAP Web Client.

A. LAUNCHING THE WAP WEB CLIENT AND LOGGING ON

5.4 To launch the WAP Web client:

1. From your WAP device Web browser, navigate to the http://<MACHINE_NAME>/UC/ web page. The default web page detects it is running on a WAP device and automatically redirects you to http://<MACHINE_NAME>/UC/WAP/. The logon screen appears as shown at right.



2. Enter your UC username and password. If you enter a username/password pair that does not exist, an error message appears, and you are given an opportunity to try again. If you enter a valid username/password pair, the user interface (see page 5-88) appears.

NOTE: Unlike the other UC clients, the WAP Web client does not log in to the UC Server application during a session. When you first enter your logon credentials, the WAP Web client validates the credentials. All subsequent actions you take are executed as transactions on the UC Server application using the logon credentials. At no time does the WAP Web client actually log on to the UC Server application. Refer to the architecture section (see page B-5) for more details.

ALSO: On the Openwave 3.2 browser, you must include the "/" on the end of the web address. This is not necessary on other WAP browsers.

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